

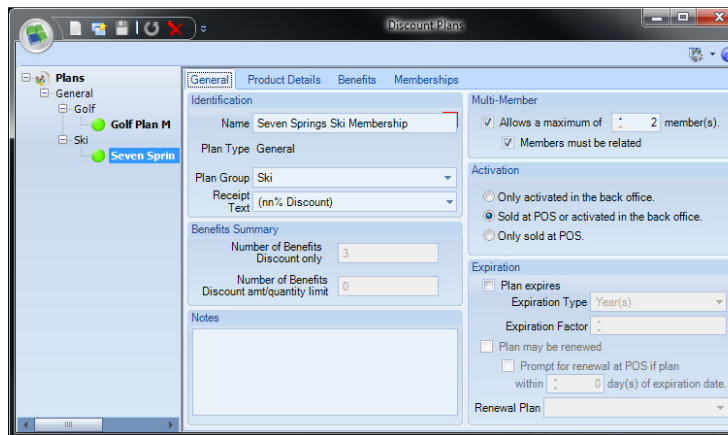
TALLYSOFT® CUSTOMER RELATIONSHIP MANAGEMENT



We know your customer is your #1 priority. TallySales Customer Relationship Manager is designed to assist you in communicating with your customers. By capturing information at the point of sale, you can easily identify customer buying trends and improve customer satisfaction. TallySales incorporates the customer management features needed to effectively communicate with your customers.

Customer Incentive Discount Plans

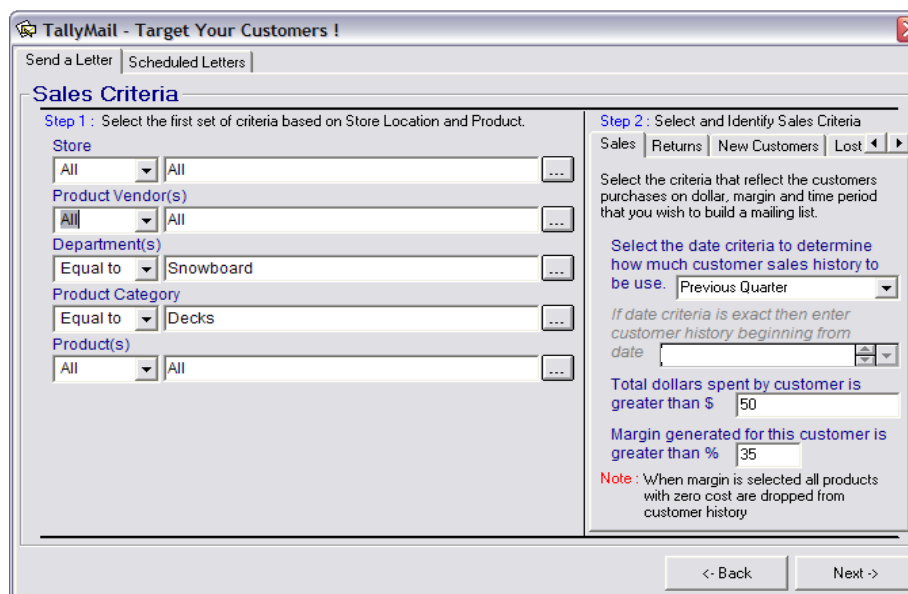
With customer incentive discount plans, you can assign automatic discounts to reward your customers for remaining loyal to you. Simply create or modify a plan and select the products that you want to discount. This will save the cashier time and can be used in tandem with Member Cards. You can also set whether the customer is an employee or a Loyalty Program Member.



TallyMail / e-Mail

The TallyMail program allows you to create mass mailings to stimulate business or show appreciation to your customers by sending out a birthday wish or thank you letter to new customers. Capturing customer information at the point of sale allows you to sort through your best customers and reward them with coupons or gift cards. An example of a mass mailing you might send is alerting customers about a product recall. By creating your own custom letter, TallyMail gives you a simple and quick solution to send and alert the customers that purchased that product.

For this particular example, the mailing was created to send information to any customer that has purchased an item out of the Snowboard department and Decks category, spending more than \$50.00. The user has chosen to only include customers who purchased any of these items from the previous quarter until now.



With TallyMail you can easily print labels for targeted mailings, export to Excel for further manipulation, e-Mail or send to an e-Mail marketing program.

Purchasing History

Attaching a customer to a sale is very simple and can be done at any time during the sale or even after the sale has been completed. Once a customer is attached to a sale, their purchasing history will be stored for the life of the system or until it is purged by you. If a customer needs to return an item and doesn't have their receipt, you can easily reprint a sales receipt or view previous purchases from as far back as you choose. Layaways, special orders and in-store accounts (with optional finance charges) can also be viewed and reprinted.

The image displays three overlapping screenshots of the TallySoft software interface for a customer named John F. Kennedy.

The top-left screenshot shows the 'General' tab of the customer profile. It includes fields for Company Name, Title, Last Name (Kennedy), First Name (John), Address (1600 Pennsylvania Ave NW), City, State, Zip (Washington, DC, 20500-0034), Country (UNITED STATES), and various phone numbers. A small photo of John F. Kennedy is visible in the 'Image' field.

The top-right screenshot shows the 'Activity' tab, displaying a 'General Summary' and 'Summary Year-To-Date' information. The 'General Summary' includes: Last Activity On 09/11/2013, Last Sale On 09/11/2013, Last Mailing On NA, and Last Invoiced On 08/14/2013. The 'Summary Year-To-Date' shows: Total Sales 6, Total Sales Amount \$114.95, Total Returns 6, and Total Return Amount \$101.94. Below this is an 'Activity' table with columns for Id, Type, Sale, Quantity, SKU, Product, Amount, and Sale Tax.

Id	Type	Sale	Quantity	SKU	Product	Amount	Sale Tax
602010000116			-1	21001000906	Nike Mens Classic Glove	-\$16.99	\$0.00
602010000116			-1	21001000488	M Classic Golf Glove (Black/M Right)	-\$16.99	\$0.00
602010000116			1			\$16.99	\$0.00
602010000116			1			\$16.99	\$0.00
602010000116			1			\$16.99	\$0.00
602010000113			-1			\$16.99	\$0.00
602010000113			-1			\$16.99	\$0.00
602010000113			1			\$16.99	\$0.00
602010000113			1			\$16.99	\$0.00
602010000113			1			\$16.99	\$0.00

The bottom screenshot shows the 'Demographics' tab, which includes sections for 'Assignment' (Customer Type, Store: South TallySoft (1)), 'Identification' (Id Card, Ext Identifier, Ext Account No., Agent Number), 'Associated Employee' (Name, Job Type, Hire Date), 'Customer Relationship' (Primary/Secondary buttons), 'Discount' (Discount Plan), 'Point of Sale' (Tax Exempt, Tax Id, Checks: Accepted/Not Accepted), 'Card On File' (Card Number, Expiration Date, Name On Card), and 'Custom Fields' (DOB: 05/29/17, Don't Call or Email, Household Size).

Customer Demographics

Use Customer Demographics to define a customer's default store, select discount plan, keep their tax exempt information, retain their encrypted credit card on file, define a customer relationship and even create your own custom demographic fields. These custom fields let you provide an unlimited level of demographic details that are important to your business; i.e. A ski resort may use custom demographic fields for this customers "Boot Size", "Ski Experience Level", "Age", "Do Not Send Promotional Emails", and more.



Complete Retail Management Solution

311 South Central Avenue
Canonsburg, PA 15317
888-TallySoft (888-825-5976)
www.tallysoft.com